

TPA AUTHORIZATION

Introduction	This section of the document will explain how an authorized user can create or maintain a Third Party Administrator (TPA) relationship on an employer account. The process begins when an employer elects to update the current relationship with a TPA or create a new TPA relationship. During this process, the functions that the TPA can perform on behalf of the employer are established by role assignment. The process ends with a correspondence being generated to the TPA.
Helpful hints.	Two different TPA accounts can never be associated to the same employer role.

Step-by-Step Instructions:

Create a new TPA relationship:

1. Navigate to the account maintenance home page using the instructions provided in the section – 'Navigating to Account Maintenance'.
2. Click on the 'Third Party Administrator (TPA) Authorization' link from the list of available maintenance services. The following screen will appear.

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Employer Information

Employer Account Number: 1000. Employer Name: Employer

Third Party Administrator (TPA) Authorization

Using either the TPA Name or TPA ID you may search for an existing Third Party Administrator that was previously assigned to your account.

To see all TPAs associated with your account press Search without entering any search criteria.

TPA Name:

TPA ID:

Role: All

Select Link for [Role Definitions](#) [?]

Select 'New' to assign a new TPA to your account. In order to assign a new TPA to your account, you must have their TPA ID (contact your TPA to get this information).

3. Click on 'New' to create a new TPA relationship. The following screen will be displayed. Enter the TPA ID you wish to assign to the employer account and click 'Next'.

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Employer Information


Employer Account Number: 1000. Employer Name: Employer

Assign Third Party Administrator (TPA)

In order to authorize a Third Party Administrator (TPA) for your account you must have their TPA ID (contact your TPA to obtain this information). To begin the TPA authorization process, please enter the TPA ID in the field below and select 'Next'.

TPA ID [?]: *

- On the page that is displayed, enter the start and end dates for the assignment. Check the boxes against roles that you wish to grant to the TPA.



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Employer Information

Employer Account Number: **1000** Employer Name: **Employer**

Third Party Administrator (TPA) Information

TPA ID: **100** TPA Name: **TPA**

TPA Details

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.

Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the roles(s) you would like them to perform.

TPA Services Begin Date:

TPA Services End Date:

Assigned Roles

To assign and unassign TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business unit.

The system will, as a default, assign a TPA role to all reporting units unless you change the units assigned to each role.

Click the checkbox in the 'Remove' column to un-assign this role to the selected TPA.

No records found...

Un-assigned Roles

Select the checkbox in the Add column to assign this role to the selected TPA, then press "Save". If you press "Previous", or do not press "Save" after checking your selection, role assignment selections will be lost.

Note that all Roles not assigned to TPAs can only be performed by the employer.

Add	Role
<input type="checkbox"/>	Account Maintenance Update and Submit *
<input type="checkbox"/>	Account Maintenance View Only
<input type="checkbox"/>	Benefit Charges Protest Submission *
<input type="checkbox"/>	Benefit Charges View Only
<input type="checkbox"/>	Payments Update and Submit *
<input type="checkbox"/>	Payments View Only
<input type="checkbox"/>	Employment and Wage Detail Update and Submit *
<input type="checkbox"/>	Employment and Wage Detail View Only
<input type="checkbox"/>	Wage and Separation Mailing *

Previous

Save

- Click on 'Save' and the TPA relationship will be established.

Modifying TPA Relationship:

- Follow the first 2 steps outlined in 'Create a new TPA relationship'. The screen shown below will appear.
- If you wish to limit your search to a specific TPA, enter the TPA name or ID. Click on 'Search'. Alternatively, click on 'Search' without entering any search criteria to see all TPA(s) associated with the account.
- The search results will appear as shown below. Click on the TPA ID to update the account.

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Employer InformationEmployer Account Number: **1000**Employer Name: **Employer****Third Party Administrator (TPA) Authorization**

Using either the TPA Name or TPA ID you may search for an existing Third Party Administrator that was previously assigned to your account.

To see all TPAs associated with your account press Search without entering any search criteria.

TPA Name: TPA ID: Role: **All**[Search](#)[Reset](#)**Results**

To update a TPA's role or to remove a TPA from your account, select the TPA from the list below.

TPA ID	TPA Name	TPA Services Begin Date	TPA Services End Date	Role(s)
100	TPA	11/6/2009		Account Maintenance Update and Submit Benefit Charges Protest Submission Employment and Wage Detail Update and Submit Payments Update and Submit Wage and Separation Mailing

Select Link for [Role Definitions](#)®

Select 'New' to assign a new TPA to your account. In order to assign a new TPA to your account, you must have their TPA ID (contact your TPA to get this information).

[Home](#)[New](#)

4. The following page will appear. If you wish to manage only existing role assignments to reporting units, click on 'Assigned Units' as shown below. Proceed to step 6 if you have to perform additional functions.

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Employer InformationEmployer Account Number: **1000**Employer Name: **Employer****Third Party Administrator (TPA) Details**

To assign and un-assign TPA roles or to remove the TPA from your account select the 'Modify' button.

TPA ID: **101**TPA Name: **TPA**Address: **XXXXX****Boston, MA 02114****United States Of America**Phone: **617-000-0000 ext:**E-Mail: **xyz@**TPA Service Begin Date: **11/6/**

TPA Service End Date:

[Modify](#)

Click here to modify all role assignments or terminate association.

Assigned Roles

To assign and un-assign TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business unit.


The system will, as default, assign a TPA role to all individual reporting units unless you change the roles assigned to each unit.

Role	Reporting Unit Number	Reporting Unit Name	Modify
Account Maintenance Update and Submit	0000 0001	Employer, Boston Employer, Boston	Assigned Units
Benefit Charges Protest Submission	0000	Employer, Boston	Assigned Units
Employment and Wage Detail Update and Submit			Assigned Units
Payments Update and Submit	0001	Employer, Boston	Assigned Units
Wage and Separation Mailing	0000 0001	Employer, Boston Employer, Boston	Assigned Units

Click here to manage existing role assignments to reporting units.

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- The following screen will appear. Add or remove reporting units to this specific role by using checkboxes. Click on 'Save'. The reporting units will now be assigned/unassigned.



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Employer Information

Employer Account Number: **1000** Employer Name: **Employer**

Third Party Administrator (TPA) Information

TPA ID: **10** TPA Name: **TPA**

Assigned Role

Account Maintenance Update and Submit

In order to add or remove a reporting unit assignment, please select the appropriate check-box, then click 'Save'. If you do not click 'Save', or click 'Previous', changes to role assignment will be lost.

Assigned Employer Reporting Units ■ Unassign All

Remove	Reporting Unit Number	Name
<input type="checkbox"/>	0000	Employer, BOSTON
<input type="checkbox"/>	0001	Employer, Boston

Un-assigned Employer Reporting Units ■ Assign All

No records found...

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Save
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- Click on 'Modify' as shown in the screenshot from step 3. The following window will appear. If you wish to end the TPA association with your employer account, enter a date in the field 'TPA Services End Date'.

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Employer Account Number: 1000

Employer Name: Employer

Third Party Administrator (TPA) Information

TPA ID: 100

TPA Name: TPA

TPA Details

Enter the date that this TPA will begin performing services for your organization. Enter the date that this TPA will cease performing services for your organization. If you choose not to enter an end date, the TPA will be authorized to perform services on your account indefinitely.

Using the check boxes in the 'Add' and 'Remove' columns, assign the TPA to the role(s) you would like

TPA Services Begin Date: 11/6/2009

TPA Services End Date:

Enter end date

Assigned Roles

To assign and unassign TPA roles to individual reporting units select the Assigned Units link in the Modify column. This will open the window where you can assign roles by business unit.

The system will, as a default, assign a TPA role to all reporting units unless you change the units assigned to each role.

Click the checkbox in the 'Remove' column to un-assign this role to the selected TPA.

Remove	Role	Modify
<input type="checkbox"/>	Account Maintenance Update and Submit	Assigned Units
<input type="checkbox"/>	Employment and Wage Detail Update and Submit	Assigned Units
<input type="checkbox"/>	Wage and Separation Mailing	Assigned Units

Check here to remove this role

Un-assigned Roles

Select the checkbox in the Add column to assign this role to the selected TPA, then press "Save". If you press "Previous", or do not press "Save" after checking your selection, role assignment selections will be lost.

Note that all Roles not assigned to TPAs can only be performed by the employer.

Add	Role
<input type="checkbox"/>	Account Maintenance View Only
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	Employment and Wage Detail View Only

Check here to add this role

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- If you wish to change role assignments to this TPA, use the checkboxes in columns 'Add' or 'Remove' as necessary (as shown in above screen).
- Click 'Save' to update record with your changes.